



State of Montana Project Management Office

Project Concept Phase

Project Deliverables Matrix Instructions

This document is an outline for defining the "deliverables" that your team creates during your project.

"Deliverables" are simply information that the team needs to write down and communicate to others, sometimes inside the team, sometimes outside the team. They reflect decisions about aspects of the project (such as design review minutes), plans for work that needs to take place (such as test plans or manufacturing plans), and guiding specifications (such as a software requirements document). To be effective, these documents need to communicate the right information to the right people on the team at the right time.

Using the template below can help you make sure the right information gets included in your deliverables, that the correct audience is defined and that the correct timing has been captured.

More importantly, this document will allow you to build out your project plan from its contents.

An example has been provided for your benefit that you can use as a guide on how to complete this document.

Fill in the attached spreadsheet, capturing the deliverables for your project and ensuring that all columns are filled in for each deliverable. Add or remove rows as needed on the template.

Column Definitions

- **ID** – unique number assigned to each deliverable.
- **Phase** – the phase where that deliverable will be created.
- **Stream** – a categorization of the deliverable. In all cases you should build the Legend for your categories.

Here are some examples:

- **Change:** Delivery is causing a change in the process or way we do things.
- **Customization:** This is a part of the customization requirements.
- **Tech:** This is a technical delivery.

- **Manage:** Delivery is part of managing the overall project.
- **Training:** Delivery is part of the training requirements.
- **Deliverable** – The name or title of the deliverable.
- **Content** – The content, or description, of the deliverable that will be produced.
- **Author(s)** – The name(s) of the individual(s) that identified the deliverable.
- **Approvers(s)** – The name(s) of the individual(s) that can approve (sign-off) on the delivery of the deliverable.
- **Due** – Date that the deliverable is due.
- **Target Audience** – The audience that the deliverable is expected to target.
- **Deliverable Form** – The format and/or tool to be used for each deliverable.
- **Responsibility Matrix** – Identifies the roles that each identified resource plays in the delivery of the deliverable. In the green cells, add the name of the resource required (1 per column) for the deliverable. Add more Columns if needed.
 - ✓ **Primary:** The first point of contact and lead. Coordinates the effort of all contributors and is responsible for the creation, content and completion of the deliverable.
 - ✓ **Assist:** A major contributor to the content of the deliverable. Once the Primary has set direction and requirements for the deliverable, the Assist provides content and knowledge as requested.
 - ✓ **Reviews:** Reviews the deliverable for completeness, consistency and accuracy, providing feedback based on business and industry knowledge.
Note: This resource generally only participates when each draft of the deliverable is available, however, they may provide feedback and direction during the deliverable creation.
 - ✓ **None** – Indicates that the identified resource plays no role in the deliverable.

Administrative Information

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